

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte Counties

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 2

Provider: Legal Services of Northern California

Counties: Lassen, Modoc, Shasta, Siskiyou, and Trinity

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 4

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Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

Optional Success
Story(ies)/Case Summary(ies)

July 2016 LSNC provided assistance to a disabled older adult who wished to cash a check written to her now deceased brother for a court awarded settlement in a case stemming from unfair bank fees charged on his bank account while he was alive. Our client was given several options and was able to get the check cashed using a small estate probate form available in California for that purpose. LSNC provided research, information and assistance to a frail older adult who was being charged for two alarm security systems. The contract for her initial system had been transferred inappropriately to a new company when the previous company had failed to renew its California security licenses and was thus prohibited from doing business in California. The old company failed to notify the client that they had gone out of business and the new company began taking automatic payments from client's checking account without notice and even after the initial contract term [with the initial company] had expired. Client signed-up for a new service and then discovered she was being billed for two. LSNC reviewed her contracts, the law for alarm system operators in California, and got her bank (who initially refused) to stop taking payments from her account to pay the first and expired contract account. The ASO company agreed to cease attempting to collect on the expired contract and now client has just the one alarm system she wants with the company she wants. Client is informed of her right to file a complaint with the Bureau of Security and Investigative Services if she so chooses. August 2016 None. September 2016 None.

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba Counties

Optional Success
Story(ies)/Case Summary(ies)

Legal assistance hours for the quarter include 232.25 for Sutter County and 209.50 for Yuba County (441.75 total). Legal representation hours include 25.25 for Sutter County and 27.25 for Yuba County (52.50 total). Grand total of service units for the 1st quarter of FY 16/17 total 494.25 hours.

The community education activities were four for Sutter County with 10.00 hours and two for Yuba County with 4.00 hours (14.00 total).

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Legal Services of Northern California

Counties: Yolo

Optional Success
Story(ies)/Case Summary(ies)

Ms. A is in her late 80s. She was shopping at a big box store and was approached by a salesperson who represented that she could bundle her cable and internet services for two years at \$26.99 a month. The client contacted her daughter because she was concerned she did not understand the terms. The salesperson reiterated the offer and the client, believing that she was bundling her services and lowering her overall cost, signed a two year contract. The provider installed the cable box and sent her a bill which clearly indicated that the services were not bundled and that the contract was for one year. She called the internet provider and was informed that there is no bundle package similar to what the salesperson represented. She then called the cable provider and was told that she did not sign up for a bundle package and that the price would be \$60/month after one year. She told them that she was misled and wanted to cancel the contract. She then received a bill for almost \$500 for terminating the contract early. Ms. A contacted Legal Services. Legal Services wrote a demand letter to the cable provider notifying the company that she was rescinding the contract due to fraudulent misrepresentation and demanding that they cease collection activity against Ms. A. The cable company acknowledged in writing that they waived the early termination fee and cancelled the contract.

Mrs. A is in her nineties and was living independently until a few months ago, when she needed a higher level of care. She was renting an apartment on a term lease and gave notice to her landlord that she needed to vacate due to the need for assisted living. She moved out a month later. The landlord changed the locks before she was able to move all of her belongings out of the home. He then failed to return her security deposit to her, even though she left the rental home in broom clean condition. She tried to obtain the property and the deposit on her own without success. She contacted Legal Services for assistance. Her attorney wrote a letter to the landlord and the security deposit was returned and her items were made available for pick up within a few days. Ms. X worked for a large company with multiple office locations for nearly 30 years. She had moved up to a management position. Her employer hired a new operations officer who made drastic changes to her work environment and removed her from her supervisory duties. She was under a significant amount of stress and felt forced out of her job. She ultimately resigned and applied for unemployment insurance. She was denied because the Employment Development Department found she quit without good cause. She sought assistance from LSNC in her appeal. LSNC represented the client at her administrative hearing and argued that she was constructively terminated when the new operations officer drastically changed her responsibilities and work environment. The Judge agreed, and the client was granted benefits.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff holds office hours at the following locations: Esparto: 1st Thursday of the month, every other month at RISE; West Sacramento: 4th Thursday of the month at the Senior Center; Knights Landing: As needed, 1st Monday of the month at the Center for Families; Winters: date to be determined. The RISE seniors group no longer meets so we are searching for alternate outreach opportunities in Winters. Clarksburg: 3rd Thursday of the month at the Yolo County library. Davis: 1st Monday of the month at Grace in Action (housed at the United Methodist Church). In addition, LSNC attends monthly meetings of the Multi-Disciplinary team with APS, HHSA, and other advocates for older adults. LSNC also participates in regular meetings of the Yolo County Health Aging

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| <p>Alliance (YHAA) and chairs the YHAA Collaboration Subcommittee attended by Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Health and Human Services, Veteran's Services, and representatives from the three Senior Centers. LSNC is also participating in planning meetings for the Yolo County ADRC and the Yolo Center for Aging. Legal Representation: 117.20 Legal Advice/ Assistance: 221.90 Community Education: 10.20 Special Outreach: 3.00 Total Hours: 352.30</p> |
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Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success
 Story(ies)/Case Summary(ies)

Optional Information on
 Collaboration with Other
 Advocacy Groups

PSA: 5

Provider: Legal Aid of the North Bay

Counties: Marin County

Optional Success
 Story(ies)/Case Summary(ies)

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| <p>A 60 year-old client lived with her partner for 30 years before he died. The partner's adult children told our client that her mobile home and everything inside belonged to them, but LAM obtained a pro-bono attorney to assist her in resolving the legal issues and protecting her rights. Two elderly clients with severe health issues were placed with pro bono attorneys to prepare advanced health care directives and power of attorney documents, along with other estate planning information.</p> |
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Optional Information on
 Collaboration with Other
 Advocacy Groups

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| <p>Legal Aid of Marin worked with fraud prevention specialists at the Bank of Marin and District Attorney's Office to prepare and deliver a session on August 4, 2016 at the Dance Palace in Point Reyes on how to avoid elder financial abuse, and participants reported it as a very successful and useful session.</p> |
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PSA: 6

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Provider: Nihonmachi Legal Outreach dba API Legal O **Counties: San Francisco**
Outreach

Optional Success
Story(ies)/Case Summary(ies)

APILO assisted an elderly client at a San Francisco clinic, and our staff attorney followed up in the office to help draft a letter to the client's doctor with instructions on filling out an N-648 disability waiver, with an attached sample N-648. Staff explained the importance of establishing a nexus between client's medical/mental condition, and his inability to study for the English/Civics test otherwise required for naturalization. With APILO staff translating, attorney called client to explain and advise him to take the letter to his doctor's appointment, and advised him and his doctor to call if they had any issues. Client successfully obtained a signed N-648 from his doctor and with it, went ahead to proceed with another agency providing language assistance in filing out his N-400 with disability waiver. Because of client's age and language barrier, staff was initially worried about whether he understood the complexity of the N-648 disability waiver over the phone. He had disabilities and no one to take him to the office for an in-person consult. Thankfully, he was able to take the mailed letter with the requirements for filling out N-648 to his doctor, and obtain a signed waiver with which he can now apply for naturalization. Through this experience, staff learned the importance of persisting in following up with a client despite difficulties in communication.

Optional Information on
Collaboration with Other
Advocacy Groups

APILO convenes an API Elder Abuse Task Force for our community-based partners to address issues of safe and secure living for elders and adults with disabilities. APILO is also an active member on the San Francisco Long Term Care Coordinating Council (LTCCC) that advises the Mayor on issues surrounding services for elders and adults with disabilities in the city, specifically in the subcommittee on housing, focusing our efforts on the current housing crisis. In addition, we work with the Family Violence Council and Department on the Status of Women around issues of Elder Abuse. As a founding and active member, we meet with other community based agencies, the DA's office, Victim Witness services, and Adult Protective Services, sharing best practices and ways to better serve limited English-speaking elders and people with disabilities. Two of our attorneys are also on the Aids Legal Referral Panel, where along with other requirements: clients are entitled to an initial hour of consultation free of charge; simple wills, DPAs, and declarations to physicians are provided at no charge; and each attorney takes at least two cases per year from the panel. API Legal Outreach remains a legal and technical resource for every partner organization and collaborative in the areas of elder law and abuse.

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Provider: Legal Assistance to the Elderly

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Client is a 78 year old disabled woman, who lives in a 1 bedroom apartment in the Sunset District of San Francisco. Her son, who is not a tenant, is her caregiver. He has both alcohol and mental health issues. She was being evicted for nuisance based on her son's behavior. She filed a pro per answer with the assistance of another agency and we negotiated a stipulation which will allow her to remain in the unit.

Optional Information on
Collaboration with Other
Advocacy Groups

We have a strong ongoing collaborative relationship with Adult Protective Services. They consult with us on a regular basis on landlord tenant and elder abuse issues and refer a significant number of clients to our legal staff. In many instances they continue working with our clients after the referral and facilitate our representation by providing services such as translation, transportation and emotional support.

Provider: Asian Americans Advancing Justice - Asian Law Center

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Client L is an elderly, disabled single mother living with her son on a Section 8 voucher. Late in 2015, Client L received an OMI (Owner Move-In eviction notice), and came to our office for help. She complained about harassment from the landlord, repeated attempts to raise the rent which Section 8 denied, and generally emotionally hostile living situations. We were able to defend Client L's OMI eviction, by asserting her rights under the Rent Ordinance which allows a disabled and/or elderly person to stay in their home if they have been living in their home for 10 years or more, even if a landlord commences an OMI.

However, starting in February of 2016, Client L returned, reporting continuing harassment, failure to make repairs, and now a request to enter buyout negotiations with her. We immediately referred Client L to Chinatown Community Development Center to write a letter regarding the repairs and harassment, while we also looked at Client L's situation to determine if a buyout would be in her best interest. While Client L did not want to move, we also knew that the landlord could nullify Client L's defense by trying to move in a family member who was also elderly or disabled. We told Client L that it appeared the landlord was not pursuing this.

Finally, after many months, in August of 2016, Client L was able to find a new place to live which also accepted her Section 8 voucher. Since the landlord had offered nothing of value for her to move out, and was still dragging out negotiations without offering anything, our final advice to Client L was to simply move. This landlord had harassed her, attempted to evict her, and was now refusing to negotiate in good faith. Finding a place to transfer her Section 8 voucher was a huge victory, and moving safely to a new apartment with a good landlord was the best outcome of this case. We thus ended all communications with her landlord, and Client L has now safely moved to her new apartment.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 8

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Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success
Story(ies)/Case Summary(ies)

Case Story 1:

Legal Aid helped a senior stop a wage garnishment for over \$20,000 on a debt he didn't think he owed. Mr. D is a grandfather and a father of three. He has worked at a car wash for many years to help support his family. In 2008, Mr. D heard about a company that could lend money over the phone. He called the company and provided the lender with his bank account information. The lender agreed to loan him \$5,000, and Mr. D agreed to let them take out about \$250 every month. Mr. D had no idea that the lender was charging him 59.95% interest on the loan. When the lender stopped taking money out of Mr. D's account around 2010, he assumed that the loan was paid off. In 2012, a debt buyer sued Mr. D. The debt buyer told the court that it had served Mr. D by leaving the legal papers with someone at the car wash, and mailing a copy to him there. But Mr. D did not receive any papers. The debt buyer then waited over three years before applying to the court for a default judgment. Due to the high interest rate, the debt buyer got a judgment of \$19,990 against Mr. D. Mr. D first learned of the suit when he was notified his wages would be garnished earlier this year, at which point he immediately contacted Legal Aid. Legal Aid filed a motion to set aside the judgment on the grounds that the debt buyer had never served Mr. D. The judge agreed to dismiss the case. The judge found that even if the debt buyer had served Mr. D, the debt buyer had abused the system by allowing interest to accrue at nearly 60% for over three years.

Case Story 2:

An Adult Protective Services social worker referred Ms. K for help with an elder abuse restraining order. Ms. K had her own apartment, and she lived with her boyfriend, Mr. G. Over the course of their four year relationship, Mr. G had become physically, verbally, and emotionally abusive. This abuse included blocking Ms. K from leaving rooms and screaming in her face. Legal Aid helped Ms. K request a temporary restraining order with a move out order. The judge granted the order and the sheriff removed Mr. G from Ms. K's apartment.

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration with APS has been a huge benefit to our clients. The faster a client can get from reporting abuse to obtaining legal protection the better, and having a good system set up with APS has really helped.

The Senior Advocates attorney has participated in Commission on Aging and Adult Abuse Prevention Committee meetings.

PSA: 9

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Provider: Legal Assistance for Seniors

Counties: Alameda County

Optional Success
Story(ies)/Case Summary(ies)

In 2015, Legal Assistance for Seniors represented Mr. C a 54 year old ex-step-grandfather obtain guardianship of his seven year old granddaughter, H. In 2016, Mr. C returned to LAS because H's mother filed to terminate the guardianship.

H's mother is bipolar. In a severe manic phase, H's mother filed for termination of guardianship before admitting herself to a psychiatric hospital. Despite multiple procedural problems with her petition to terminate and her recent hospitalization, the court entertained her request and set multiple hearings and referred the family to mediation. The recent courtroom consolidation multiplied the problem and led to duplicate hearings and last minute courtroom changes.

LAS successfully navigated Mr. C through the procedural difficulties of the case and defended Mr. C's guardianship. LAS also facilitated discussions between Mr. C and H's mother and drafted a visitation agreement. The court adopted the terms of the agreement and dismissed H's mother's petition to terminate. H remains safe in Mr. C's home.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

PSA: 10

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Provider: Senior Adult Legal Assistance (SALA)

Counties: Santa Clara County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services
For the 1st quarter of 2016-17, SALA provided on-site legal service intake appointments at 24 senior centers or sites in Santa Clara County. These sites included: These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center temporarily located at Gardner Community Center during Alma's renovation (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Los Gatos Recreation Center, Saratoga Senior Center, Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

PSA: 11

Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 12

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Quarter: 1

Provider: Catholic Charities

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu
mes**

Optional Success
Story(ies)/Case Summary(ies)

None

Optional Information on
Collaboration with Other
Advocacy Groups

None

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 14

Provider: Central California Legal Services, Inc.

Counties: Fresno & Madera

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 15

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Provider: Central California Legal Services, Inc.

Counties: Tulare County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Central California Legal Services, Inc.

Counties: Kings County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 16

Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success
Story(ies)/Case Summary(ies)

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| As we now have an emphasis to focus of our services towards more legal and community education including referrals, we are currently planning to host 1-3 community education presentations at separate senior centers in the community for the upcoming quarter and provided 11 referrals and 24 self-help packets in addition to the above reported services. Self-Help Packet | 14 - Power of Attorney (POA) - 10 - Advance health Care Directive - Self-Help Packet |
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Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 17

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Provider: Central Coast Commission for Senior Citizen Counties:

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 18

Provider: Grey Law of Ventura County

Counties: Ventura

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 19

Provider: Bet Tzedek

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 20

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Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 15E-7005667:

The client, a 77 year old woman, came to ICLS for help when she was blindsided when her husband, from whom she had been separated from for many years, filed for divorce. She had left him years ago after he had hit her and physically abused her in August 2012. That was she left him as well as the state of California. Years later she received divorce paperwork from him and filed a response on her own. She was still living out East but decided to move back to California to complete the divorce. The ICLS advocate is assisting her and was able to obtain an order for temporary spousal support. The client was assisted with her hearing on spousal support, her divorce paperwork as well as other documents. As a result, her income more than doubled from what she had been receiving before obtaining the legal assistance.

Case #2: 16E-7004772:

The client is a 72 year old widowed senior, originally from Afghanistan, whose spouse passed away a year ago. She came to ICLS for assistance regarding her Medi-Cal. The client is a citizen but has some difficulties understanding and communicating in English. She has used ICLS services on many occasions since her husband passed away because he had always handled everything.

She received a notice informing her that her Medi-Cal benefits would be discontinued at the end of August 2016 for failing to provide proof of her income. The ICLS advocate advised the client to immediately file for a State Fair Hearing.

In June 2016 the client had eye surgery and has problems seeing. She requested assistance with completing her documents she received from Medi-Cal. The advocate assisted in completion of the "Annual Redetermination" and with submitting the requested documents to Medi-Cal. The advocate knew that the statement from Social Security had been included as proof of her income.

When the Appeals Specialist contacted the advocate, she informed her that the client had failed to provide proof of her pension. The advocate requested that the Appeals Specialist review the clients file because she had assisted the client numerous occasions and the client had never received a pension, her spouse had never received a pension and the client had never worked in the United States or in Afghanistan.

The Appeals Counsel agreed and stopped the client's Medi-Cal from being discontinued. In return, the advocate agreed, on the client's behalf, to withdraw the client's Request for a State Fair Hearing.

The client was so relieved and thankful for all of the assistance she had received from ICLS and so grateful to be living in and being a part of this country. She knows that she can always count on ICLS for assistance.

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Case Story #3: 16E-7002975:

A 73 year old disabled monolingual Spanish speaking widower came to ICLS for help in evicting his son from his home. The client's son, who had always lived in the client's home, had been giving the client problems since he was 14 years old. Now 35 years old, the son is married. His wife and son both live in the client's home and shared one bedroom. The son never paid any rent. Occasionally he would give the client some money, but it wasn't even enough to cover the cost of food and shelter for 3 people. When the son lost his job he stopped contributing completely. The son had always been disrespectful and it kept getting worse. When the client had finally had enough, he told his son to leave but the son refused. This situation was causing the client a lot of anguish and distress which escalated when the client became aware that his son was into drugs and using drugs in the home. After numerous attempts to get the son to leave, the client served his son with a 30 Day Notice to Terminate Tenancy which the ICLS advocate prepared for the client. The advocate then advised the client that if his son still had not moved out the client would need to file an Unlawful Detainer (UD) lawsuit against his son. If the court ruled in the client's favor, the client would be able to have the Sheriff evict him if he still refused to leave. The advocate advised the client of the UD procedure and that the advocate would prepare the documents for the client which would also include a request for a Fee Waiver.

When the client missed his appointment the advocate contacted the client who informed him that his son, daughter-in-law and grandson had all moved out and the client was glad that he had not had to file a UD. The client was grateful for the assistance he had received from ICLS.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 21

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Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 16E-4006147:

The client is a 66 year old monolingual Spanish speaking disabled gentleman. He sought ICLS's help because he had been sued in a Domestic Violence Temporary Restraining Order (DVTRO) filed by his ex-wife. They divorced in 2011 after 41 years of marriage and seven (7) children. The client stated that he was at a family gathering at his son's house for the Fourth of July. On his way to the restroom his 1 year and 10 month old granddaughter raised her arms at him while she was on his ex-wife's lap. As he reached to get his granddaughter his ex-wife pulled on the child and did not allow him to take the child yelling at him "estupido" (which translates to "stupid") in front of everyone. The client slapped his ex-wife in reaction to her yelling at him.

The ICLS advocate agreed to assist the client in formulating his response to the DVTRO. The hearing was held and the DVTRO was dismissed against him. The advocate was able to assist this client and meet his goal of having the DVTRO dismissed.

Case #2: 16E-2003639:

The client is a 66 year old disabled gentleman who is legally blind and has macular degeneration. He was laid off his job in 2009 at 59 years of age (the layoff was unrelated to his eye sight condition). Because he did not, at that time, consider himself "disabled" he did not apply for Social Security Disability.

In 2012, at age 62 he applied for early retirement benefits although he did not really want to retire, he was not employed and needed a monthly income. He was also having more difficulty with his eyesight. In September 2012 his doctor diagnosed him as "legally blind". At that time he tried to go back and apply for Social Security Disability (about three years after beginning to receive early retirement) and received a denial. He requested Reconsideration at which point he contacted ICLS. His benefits were awarded at the reconsideration level and his Social Security award has been increased by \$33.00 per month.

He also had a very high share of cost Medi-Cal in the amount of \$800 per month. He was informed that he could obtain an insurance plan in the amount of \$299 monthly to offset the share of cost. The \$299 was too high for him to afford. He was also seeking benefits through In Home Support Services but he would have to pay the \$800 monthly share of cost and medical insurance is not an offset.

The advocate advised the client to consider the Medi-Cal 250% working disabled program. He stated that he would be happy to work. He applied and his application was approved. With help from the Department of Rehabilitation computer accessories he is able to do some graphic computer work.

The client is now receiving an additional \$33 per month from Social Security, and paying a Medi-Cal 250% program monthly premium of only \$20 instead of the traditional \$150. This results in a monthly savings of \$143.

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The client is very happy. He is working and plans to continue with the Department of Rehabilitation to better himself for the future. He appreciates the extra money in his pockets each month and has expressed that he is grateful to ICLS for the assistance and concern for his well being he received.

Case #3: 16E-4005384:

This client, a 75 year old disabled widower, came to ICLS seeking representation in his Cal-Fresh State Hearing Appeal process. His advocate represented him in the hearing before an Administrative Law Judge (ALJ) who ruled in the client's favor. The ALJ found that Riverside County had incorrectly determined the client's Cal-Fresh monthly allotment to be \$19 beginning June 1, 2016. The client will be able to continue receiving his Cal-Fresh benefits, but instead of getting \$19 per month he will receive \$49 per month due to the miscalculation retroactive to June 2016. The ALJ decision was based on the Cal-Fresh regulation MPP 63-102(e).

The advocate met and conferred with opposing counsel, and the opposing counsel ultimately decided to dismiss the husband's request to terminate her spousal support.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

Optional Success
Story(ies)/Case Summary(ies)

We recently represented an elderly Vietnamese couple whose SSI benefits had been reduced because Social Security alleged they received "in-kind" financial help with their housing costs. Their monthly benefits had been reduced from about \$817/mo. to \$431/mo each. At the Administrative Law Judge Hearing, we were able to show that they were paying their share of housing expenses. The judge stated that he will issue a favorable ruling stating that the couple did pay their share of housing costs. As a result, their respective incomes should increase about \$386/mo each and they should be reimbursed for an underpayment due to the fact that during the last year Social Security paid less SSI benefits than the amount the couple was eligible to receive.

Optional Information on
Collaboration with Other
Advocacy Groups

The month of September marks the start of the 3rd year that LASOC has operated the Elder and Dependant Adult Abuse TRO Clinic at the Central Justice Court in Santa Ana. The Clinic resulted from a series of meetings with a variety of community groups and the court. Judge Kim Hubbard was very supportive and helpful in establishing the Clinic. The Clinic is held every Tuesday and Friday at the court and will assist parties in preparing TRO pleadings. The law firm of O'Melveny and Meyers sends attorneys to assist with the Clinic and to supervise law students primarily from UC Irvine Law School and Chapman Law School who assist with interviewing clients, drafting pleadings and declarations.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

PSA: 23

Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success
Story(ies)/Case Summary(ies)

Case #1

Our 89 year old client with disabilities was charged with an overpayment by the Social Security Administration. Since she had less than \$2,000, she and her daughter were perplexed as to why they were accused of being over the resource limit and why her Supplemental Social Security was going to be cut off.

Client's daughter faxed all of the relevant documents to the EL&A staff attorney. The issue was a burial insurance policy. After the policy was reviewed, it was clear that the issue had been the "cash value" of the policy, which would count towards the Social Security resource limit. Client was advised by the EL&A staff attorney to apply for a Request for a Waiver. Client, with the help of her daughter, took their Request for Waiver to the SSA office. The documents were reviewed while they were in the office, and the original decision was reversed. The client was allowed to resume her SSI payments and she was assured that as long as she did not borrow against the policy, no adverse action would be taken. Client and her daughter thanked EL&A profusely for having helped avoid destitution for this 89 year old woman.

Case #2

Our 73 year old client with disabilities received notice from Social Security that he was overpaid because he received benefits while he was incarcerated. Client was convicted of DUI, but was not sentenced to incarceration in an institution. Instead, he was sentenced to house arrest for three months. During that period, he had complete responsibility for his own living expenses and did not receive any contributions or support toward these expenses from an institution, penal system, or other correctional custodial agency.

The EL&A staff attorney researched this issue and determined that Social Security policy, under circumstances of house arrest where no government agency has paid for any expenses during the house arrest, permits Social Security benefits to be paid to the beneficiary.

The EL&A staff attorney advised Client to obtain a copy of the court document showing the judge's order for sentencing. Client was then advised to file a Request for Reconsideration with the Social Security Administration with the judge's order for sentencing attached, requesting that his overpayment amount be reduced by the amount of benefits he received during his house arrest. Client's full benefits were successfully reinstated.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 24

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Elder Law & Advocacy

Counties: Imperial

Optional Success
Story(ies)/Case Summary(ies)

Case #1

Our client, an 88 year-old veteran with disabilities, placed an in memoriam in the local newspaper to honor the anniversary of his deceased son. However, when the memoriam was published it was missing the son's name and included incorrect relationship titles for several of the listed family members. Client was understandably very emotional over the mistakes, and was offended when the newspaper asked for additional fees to publish a corrected memoriam.

The EL&A attorney wrote a letter to the newspaper, asserting the newspaper's editor should have noticed the name omission and the newspaper agreed to republish Client's memoriam without additional charges.

Case #2

Our 71 year-old client has been living in an apartment complex for several years, where she lives alone and does not have any close family. Earlier this year, her landlord entered her unit to make a repair and noticed an unhealthy accumulation of clothing, newspapers, refuse and other items piled up, resulting in blocked pathways. The repair person had difficulty maneuvering through the unit. Though Client acknowledged the condition of her unit was uninhabitable, she reportedly was overwhelmed with anxiety and was physically unable to take on the task of cleaning the unit herself.

The landlord filed an eviction case against Client for failure to maintain the unit, which was pending against her at the time she contacted our office. She was able to hire a few people to help her get rid of trash which had piled up over time, but needed assistance with requesting the court and her landlord to reconsider her ability to stay in the unit.

The EL&A attorney drafted a Motion for Relief from Forfeiture for Client, which was granted by the court. Thus, the Client was able to continue living in her apartment, which is near public transportation and is a first floor unit. Client was grateful for the assistance and took steps to ensure her unit is maintained properly in the future.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 25

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Bet Tzedek

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 26

Provider: Legal Services of Northern California

Counties: Mendocino and Lake

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 27

Provider: Legal Aid of Sonoma County

Counties: Sonoma

Optional Success
Story(ies)/Case Summary(ies)

We assisted an 80 year old woman whose housing was threatened and who was also the victim of Elder Abuse. "Mabel" was defrauded by her Son/Landlord into spending \$82,000 on a property with the promise that she could live on the property rent free. Her Son/Landlord then tried to evict Mabel. Legal aid stopped the eviction, and obtained a \$60,000 payment for Mabel which allowed her to purchase her own mobile home, thereby assuring she has housing. The settlement also allows Mabel to pursue further civil action against the Son for the \$82,000.

This case demonstrates a typical elder financial abuse pattern in Sonoma County, and the connection between such abuse and housing issues affecting our seniors.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 28

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Legal Services of Northern California

Counties: Solano

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Legal Services of Northern California

Counties: Napa

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Legal Services of Northern California

Counties: Solano County

Optional Success
Story(ies)/Case Summary(ies)

1. Ms. R came to our office after receiving a notice regarding a new lease term. Management stated that Ms. R needed to obtain renters insurance by February or she would be in violation of the lease. Ms. R is on Section 8 and cannot afford renters insurance. Ms. R does not know why renters insurance is suddenly mandatory. LSNC researched and investigated the client's issue and determined that landlord could not charge mandatory renters insurance for Section 8 participants. LSNC wrote a demand letter to the housing provider requesting that they rescind the notice about the renters insurance. Eventually, the housing provider responded to this letter stating that client was exempt from this lease provision. The client was able to maintain her housing and is under no threat of eviction.

2. Ms. H came to our office with an issue she was having in the mobilehome park she lived in. Ms. H had lived in the park for 15 years and previous signed a 10 years lease. The park owners were pressuring her into signing a new 10 year lease which she did not want to sign. The park owners then told Ms. H she was living there illegally unless she signed this agreement. Our office agreed to assist Ms. H, and wrote a letter to the park owners demanding they follow the Mobilehome Residency Law and offer the client a lease term of 12 months or less. The office responded immediately to our letter and stated they would not be evicting the client if she did not sign a lease. The park owners clarified that the client was in a month-to-month lease agreement and her tenancy was not in jeopardy.

3. Ms. J came to our office after receiving a Medi-Cal Notice of Action denying her for full-scope Medi-Cal through the Aged and Disabled Program. The reason for this was because the County had started to include her husband's income in her household income. Ms. J was separated from her husband but not legally divorced. She provided care for her husband but did not live with him. However, she had changed her address to his home because the mail at her actual address was not secure. The client requested a hearing and our office agreed to represent her. LSNC assisted the client with gathering documentation to prove her primary residence was different then her husband's residence. LSNC attended one hearing with the client in which we asked for a postponement due to the client's health. After that appearance, the County worker contacted LSNC to try to resolve the issue informally. LSNC assist the client in providing all necessary documentation to the County. The County then approved the client for full-scope Medi-Cal through the Aged and Disabled Program. The client's hearing was dismissed.

Optional Information on
Collaboration with Other
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline. Continued participation with community groups including: Solano Senior Coalition and Vallejo Senior Roundtable.

PSA: 29

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Senior Legal Services

Counties: El Dorado County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 30

Provider: Senior Advocacy Network

Counties: Stanislaus

Optional Success
Story(ies)/Case Summary(ies)

Assisted with a restraining order and kick-out order in a highly publicized case out of county. Was able to get 2 squatters out of the home of an elderly woman who lived in a remote area of Tuolumne County. The District Attorney subsequently filed Criminal Elder Financial Abuse and Identity Theft causes of action against the 2 squatters for using the seniors credit cards without her consent.

Optional Information on
Collaboration with Other
Advocacy Groups

We have been awarded a collaborative grant with the District Attorney's office which includes our agency, the Family Justice Center, Catholic Charities, and Adult Protective Services regarding Elder Abuse. This has given us the opportunity to work closely with the DA's office on elder abuse cases and we hope they will start prosecuting more of these cases.

PSA: 31

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Central California Legal Services

Counties: Merced

Optional Success
Story(ies)/Case Summary(ies)

July 2016

CCLS Case No. 16E-3003765 (Other Housing)

Client, a 67-year-old disabled Merced woman, contacted CCLS for assistance with her housing issue. Client has a 1/3 ownership interest in the home where she lives. She and her husband were making all the mortgage payments, until he died in December of 2015. She then received eviction threats from other co-owners (late husband's two siblings) after she was unable to handle the mortgage payment with just her social security income. Client's mortgage went into default, and the bank refused to work with her because the other co-owners will not cooperate.

SLSP Advocate reached co-owners of the home. They were not receptive to listing the property, and seemed to be acting more out of an animosity toward Client than their own interests. They seemed to believe that Client had no interest in the home whatsoever, relying on their own lay understanding of property law. Because Client was facing foreclosure, the timeline precluded an opportunity for litigation on the matter. Advocate discovered that the co-owners had already agreed to sell the home to a private real estate investor, but they neglected to mention Client's ownership interest. Advocate then reached out to the real estate investor and informed him of Client's interest in the home. Since the investor was committed to buying the property, Advocate was able to negotiate a separate deal with him: Client would join in the sale and take an equal share in the proceeds as outlined in the original deal with the co-owners, and would receive an additional \$20,000 payment (unbeknownst to the co-owners). As part of the agreement, Client was given 30 days to move out of the home.

As Client is disabled, she was unable to move her personal property out of the home by herself.

Advocate learned of this during his follow-up call, and made contact with the Merced Rescue Mission, a local nonprofit that operates a homeless shelter for at-risk populations and has a public service element in its curriculum. Several volunteers stepped up and, joined by Client's church and circle of friends, a in loading her items into storage. With her items in storage and sale proceeds in hand, Client is well-situated to find a replacement dwelling.

August 2016

CCLS Case Nos.: 16E-3005961 & 16E-3005965 - ELDER ABUSE

CCLS was contacted by married Clients, a 67-year-old man and 72-year-old woman, both of whom live in Merced. Clients claimed to be suffering from physical and emotional abuse and the hands of their daughter, who lives with them in their home. They called the police after the most recent violent incident, and were told by law enforcement that they needed to go to court for a restraining order before they could take any action against the daughter. They did not remove the daughter. Clients went to the court as directed, but they were unable to select, complete, and prepare the necessary restraining order documents unaided. Seeing this, the court clerk referred Clients to CCLS. SLSP Advocate interviewed Clients immediately, and prepared all documents needed to request a temporary elder abuse harassment restraining order. SLSP Advocate then prepared and filed them with the Superior Court. The Court granted Clients' request, issuing an immediate order requiring the abusive daughter to move out of the home, and prohibiting the daughter from setting foot within 100 yards of the home or any household member. SLSP Advocate had the order served on the abuser by the Sheriff, and counseled Clients on

California Legal Services (Title III B)

PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

how to represent themselves at hearing to make the order permanent. SLSP Advocate followed up with Clients, and learned that they prevailed at their hearing and were granted a permanent (3-year) protective order. Clients reported that things have calmed down, and that they feel much better overall with their daughter out of their home.

September 2016
CCLS Case No.: 16E-3004386 (Elder Abuse)
CCLS was contacted by Client, a Spanish-monolingual, 71-year-old Los Banos woman. SLSP Advocate met with Client at the Los Banos Community Center. Client lived in her home with her son and his girlfriend (the "Respondent"). Client claimed that the Respondent was disrespectful toward client, but that no physical "abuse" had occurred. Client had told the Respondent that she needed to leave the home, and she refused. Client sought assistance in removing her from the home. CCLS advocate prepared a 60-day eviction notice, and served it on the Respondent. Client wished to give her the time to find a new place to live, and Respondant at first appeared to be making efforts to relocate. After the 60 days, Respondent made it clear to client that she had no intention of leaving, telling client "If you want me to leave, you're going to have to make me." SLSP Advocate then prepared, filed and served an eviction lawsuit against Respondent, and successfully petitioned the Merced Superior Court for a waiver of the related court fees. To prevent her son from inviting Respondent back into the home, SLSP Advocate also prepared, filed, and served a petition for elder abuse restraining orders, requesting a "stay away" court order that Respondent stay 100 yards away from Client and the property. The court temporarily granted the petition pending a further hearing. When Respondent refused to move out of the home, and failed to respond to the eviction lawsuit in a timely manner, SLSP Advocate had Merced Sheriff remove her from the home. Client suspected that Respondent was sneaking around the home late at night and in the morning when Client was asleep. Working with Client and Merced Sheriff, SLSP advocate successfully arranged to serve Respondent with the "stay away" order as she left the home in the morning. At the hearing to make the temporary "stay away" order into a 5-year order, CCLS represented client and provided an interpreter. The court granted Client's request, and a 5-year order was granted. Client reports that she feels much better now that Respondent is out of her home and cannot move back in.

Optional Information on
Collaboration with Other
Advocacy Groups

July 2016
On July 15, 2016, CCLS hosted a Senior Law Clinic (see above). CCLS staff advocates met with members of the private bar to assist Merced seniors with their estate and incapacity planning documents (Wills, Health Care Directives, Durable Financial Powers of Attorney). By making this a quarterly event and reaching out to the Merced County Bar Association, CCLS seeks to foster greater partnership with private attorneys in the area.
On July 25, 2016, SLSP Advocate attended monthly Merced AAA Advisory Council meeting. After the meeting, Advocate met with LTC Ombudsman to discuss speaking at their September meeting, and with an official with the local VSO to discuss possible referral of veterans disability claims cases involving seniors.

August 2016

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

- On August 2, 2016, SLSP Advocate attended National Night Out, where he met with SLSP partners, city and county officials, members of the senior community, and discussed developments in respective offices (Medicare open enrollment, elder abuse funding, etc.).
- On August 22, 2016, SLSP Advocate and new Merced staff attorney attended Merced AAA Advisory Council Mtg.
- While no outreach event was scheduled for August 2016, considerable time was spent planning and publicizing upcoming SLSP events in October, which will be held in Merced and Gustine.

September 2016

- On 9/26/2016, Project Attorney and Staff attended Merced Area Agency on Agency Advisory Council meeting. Gave brief presentation on upcoming events
- On 9/30/2016, Project Attorney and Staff attended "Community Response to Abuse in Later Life Kickoff Event" in AM and PM, participated in program, and give discussion on SLSP and free services we offer to Merced Seniors.

PSA: 32

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Legal Services for Seniors

Counties: Monterey

Optional Success
Story(ies)/Case Summary(ies)

Notable Cases - End of Life Legal Issues including Advance Health Care Directives (AHCD's) & Wills:

(1) Mrs. Curtis, a 77-year old widow was doing a little spring-cleaning when she came across a Will she had "hand-written" many years ago. She called LSS to see if it was "still good." A review of her holographic (hand-written) Will lead to a discussion of "end-of-life" legal issues. A LSS attorney provided her with a new Will and Advance Health Care Directive covering the disposition of her property and personal medical instructions in case she was unable to speak for herself during a medical emergency. All at no-cost to Mrs. Curtis.

(2) Mr. Lee, a 68-year old veteran was worried about his future after an extended stay in the hospital for a bad fall. He wanted his son to be able to take care of his finances and make health care decisions for him in case he was unable to. A LSS attorney met with Mr. Lee at a local senior center where he has lunch. The senior center is one of ten weekly outreach sites throughout Monterey County where we help clients. The LSS attorney provided an ACHD specifying Mr. Lee's health care instructions and appointing his son to make financial and health care decisions for him in case he was unable to do so himself. All at no-cost to Mr. Lee.

Achievements – Community Education and Assistance to Veterans:

(1) This year marks the fourth consecutive year LSS has co-sponsored the Senior Day Resource Fair (SDRF) at the Monterey Fair Grounds. The SDRF is Monterey County's biggest and best attended senior resource fair with 38 exhibitors and 1,100+ seniors in attendance this year (a record high).

(2) LSS continues to increase our assistance to senior veterans at the Vet Connect Resource Fair (a new event modeled after the SDRF) and the Stand Down For Homeless Veterans (this unique event, providing assistance to homeless veterans is in the process of being replicated throughout the county).

*ALL NAMES ARE CHANGED TO PROTECT CLIENT CONFIDENTIALITY

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors continues to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center, the Santa Cruz Senior Citizens Law Center, other agencies and organizations.

PSA: 33

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 1

Provider: Greater Bakersfield Legal Assistance, Inc. Counties: Kern

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups